



Create Quote and Convert to a New Contract

Objective: This tip sheet will show you how to create a quote and convert it to a new contract. This functionality would be used if you are covering equipment and do not want to convert that equipment to an existing target contract.

Steps to create a new Quote and convert it to a New Contract in CSCC:

1. From the Dashboard, roll over the 'Estimates/Quotes' tab and click 'Create New Quote' in the secondary menu.
2. The 'Create New Quote' screen appears.
3. Navigate to the 'Line Items and Pricing' screen by clicking 'Line Items and Pricing' in the tertiary menu.
4. Click the 'Action' drop down menu, select 'Add Line' and click 'GO'.

Note: You can also add multiple lines at once using the functionality available in the Import/Export tertiary menu. Reference the Quote Basics tip sheet for more information on this functionality.

Step 3: Navigate to the 'Line Items and Pricing' screen by clicking 'Line Items and Pricing' in the tertiary menu.

Step 4: Click the 'Action' drop down menu, select 'Add Line' and click 'GO.'

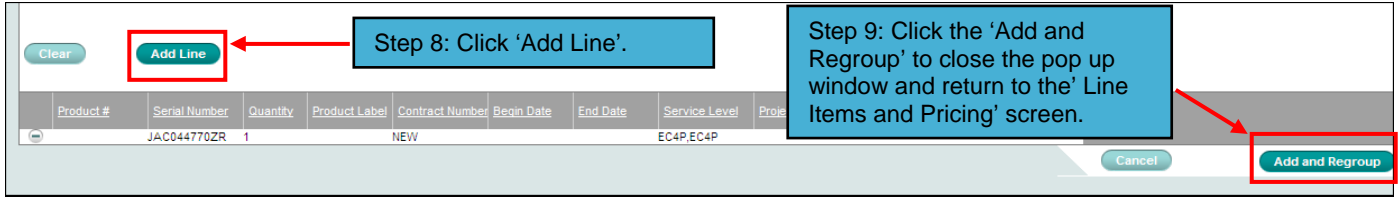
5. The 'Add Line' pop up window appears.
6. Enter the 'Serial Number' of the product you wish to add to the contract.
7. Enter 'NEW' in the 'Target Contract Number' field to convert the quote to a new contract.

Step 6: Enter your 'Serial Number.'

Step 7: Enter 'NEW' in the 'Target Contract Number' field to convert the quote to a new contract.

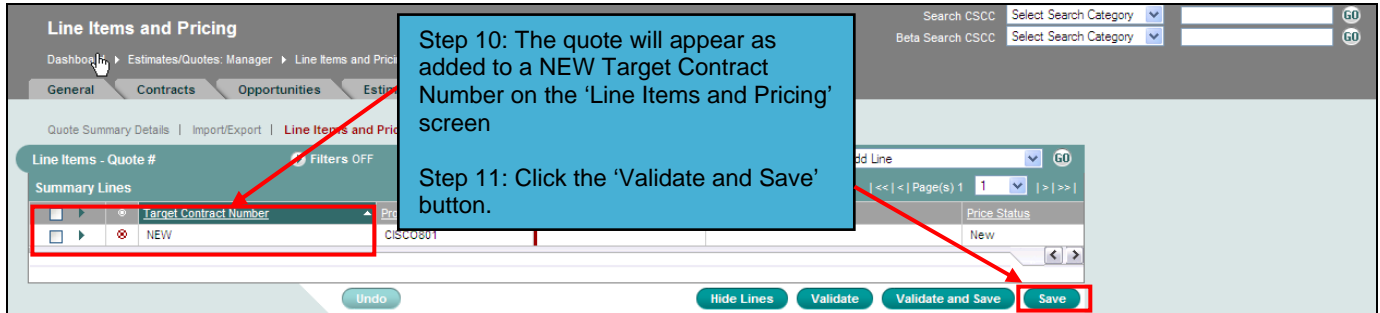
8. Click the 'Add Line' button.

9. Click 'Add and Regroup' to close the pop up window and return to the 'Line Items and Pricing' screen.



10. The quote will appear as added to a NEW Target Contract Number on the 'Line Items and Pricing' screen.

11. After selecting 'Validate' or 'Validate and Save', you may encounter errors with your quote. Go to the 'Error Details' section to resolve all errors.



Related Links:

CSCC Training Website: [Click Here](#)

Create Quote and Convert to Existing Contract Tip Sheet: [Click Here](#)